## CITY OF ANNAPOLIS RECORDS RETENTION AND DISPOSAL SCHEDULE

Schedule No.

M-116

	PLANNING AND ZONING	
Item No.	Description	Retention
1.	General Correspondence  Original incoming letters, copies of outgoing letters, memoranda, studies, reports directives, policies, and other materials related to the administration of the agency.	Screen annually and destroy the material that is not longer needed for current business. Retain permanently any material that serves to document the origin, development, and accomplishments of the office. Transfer periodically to the Maryland State Archives.
2.	Minutes of Planning Commission and Board of Appeals  Minutes of Planning Commission and Board of Appeals.	Permanent. Transfer periodically to the Maryland State Archives.
3.	Zoning Text Amendments  Staff reports, Planning Commission findings, and final adopted ordinance of Code changes to zoning section of City Code.	Retain for three years, then destroy.
4.	Zoning Map Amendments  Original application, staff report, Planning Commission findings, ordinance adopting City Council action on map amendment.	Retain for three years, then destroy.
5.	Major Subdivision Requests  Original application, preliminary plat, staff report, Planning Commission findings, final plat approved by City Council and Planning Commission.	Retain for three years, then destroy.

Department Director

Phubl
City Clerk

Shoul C. Paperpush

APR 27 2000

Schedule Approved by State Archivist

Date

CITY OF ANNAPOLIS RECORDS RETENTION AND DISPOSAL SCHEDULE
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Schedule No.

M-114

		M-116
	PLANNING AND ZONING	
Item No.	Description	Retention
6.	Board of Appeals Variances/Appeals Cases	Detain eminion and emmoved along
	Original applications, staff reports, site plans, Board of Appeals opinions on case.	Retain opinion and approved plan permanently. Transfer periodically to the Maryland State Archives. Retain other materials 10 years, then destroy.
7.	Conditional Use/Special Exception Case Records	
	Original application and exhibits, correspondence, agency review comments, staff reports, Planning Commission findings, City Council resolution of action (approval or denial) on case.	Retain opinions and approved plans permanently. Transfer periodically to the Maryland State Archives. Retain other materials for ten years, then destroy.
8.	Site Design Review Records  Original application and attachments, site plan, correspondence, approved set of signed plans.	Retain landscape agreements and approved plans permanently. Transfer periodically to the Maryland State Archives. Retain other materials 10 years, then destroy.
9.	Historic Preservation Commission	
	Minutes of Historic Preservation Commission's regular and administrative meetings.	Permanent. Transfer periodically to the Maryland State Archives.
10.	Historic Preservation Commission Property File	
	Applications for alterations or new construction, including site plans, construction documents, photographs; Certificates of Approval; correspondence regarding violations.	Permanent. Transfer periodically to the Maryland State Archives.
11.	Audio Tapes of Meetings	
	These tapes are recordings of Boards & Commissions meetings from which Minutes are prepared.	Retain one year after approval of minutes, then destroy.
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		ANNAPOLIS	RECORDS INVENTORY	
for each new or revised record series.	Records Management Program		PAGE1 OF1	
1. Department Planning and Zoning	2. Division Administration		3. Unit	
DEFINITION - RECORD SERIES - A groundisposition purposes.	p of related records	normally filed and used	as a unit for reference as well as retention	
4. Record Series Title Minutes/Agendas of Planning Commis	ssion and Board of A	Appeals	5. Earliest Year/Latest Year 1970 to present	
<ol> <li>Record Series Description (Briefly describe of the series.</li> <li>Contains minutes of meetings of Planning</li> </ol>			and in the series. Include the purpose or fund	
7. Record Series Format(s)	8. Record Series S	Sequence	9. Volume	
x Letter Size	Alphabetical  Numerical  x Chronological  Geographical		Number  □ File Drawer(s) □ Microfilm Reel(s) □ Computer Tape(s) □ Other (Specify)	
	Other (Specify	)	10. Annual Accumulation  Number  File Drawer(s)less 1 per/  Microfilm Reel(s)  Computer Tape(s)  Other (Specify)	
11. File is Used		12. File Becomes In	nactive After	
□ Daily □ Weekly x Mont	thly	10 Number	1 Month(s) x Year(s)	
13. Current Location(s) (Bldg. Floor, Room) 159 Duke of Gloucester Street, downstairs		14. Is Record Serie (If yes, specify x No Yes	es Duplicated Elsewhere? office)	
15. Access Restrictions □ Yes x No (If yes, cite law(s) & regulations)		16. Audit Requirements  x None □ State □ Federal □ Independent		
17. Is an index system used? (If yes explain briefly and describe any hardware/software.) Yes x No		18. Recommended Archive permanen	Retention Keep in-house for 10 years.	
19. Name and Title of Preparer Jane C.	. Holschuh, Executiv	ve Assistant		
-		1-1-1-	21. Date 8/12/96	

Instructions - Prepare a separate form	CITY OF ANNAPOLIS Records Management Program		RECORDS INVENTORY
for each new or revised record series.			PAGE 1 OF 1
1. Department Planning and Zoning	2. Division Administration		3. Unit
DEFINITION - RECORD SERIES - A grodisposition purposes.	up of related records no	ormally filed and used as	a unit for reference as well as retention and
4. Record Series Title Zoning Text Amendments			5. Earliest Year/Latest Year 1970 to present
6. Record Series Description (Briefly describe of the series.	e the types of information	n/documents/forms found	in the series. Include the purpose or function
Contains ordinance, staff reports, planning of City Code.	g commission findings	, and final adopted ord	inance of Code changes to zoning section
7. Record Series Format(s)	8. Record Series Se	quence	9. Volume
x Letter Size	Alphabetical  Numerical  Chronological  Geographical  Other (Specify)		Number  □ File Drawer(s) 5 legal drawers □ Microfilm Reel(s) □ Computer Tape(s) □ Other (Specify)
			10. Annual Accumulation    Number     Number     ½ drawer     File Drawer(s)   ½ drawer     Microfilm Reel(s)       Computer Tape(s)       Other (Specify)
11. File is Used  □ Daily □ Weekly x Monthly		12. File Becomes Inac	ctive After  Ionth(s) x Year(s)
13. Current Location(s) (Bidg. Floor, Roc Gloucester Street, downstairs (4 files); up		14. Is Record Series Duplicated Elsewhere?  (If yes, specify office) Yes, Office of Law  □ No □ Yes	
15. Access Restrictions □ Yes x No (If yes, cite law(s) & regulations)		16. Audit Requirements  x None □ State □ Federal □ Independent	
17. Is an index system used? (If yes explain briefly and describe any hardware/software.)  x Yes □ No We use a card file index which assigns a number comprised of year received, month received, and consecutive number assigned (96-8-490)		18. Recommended Re Dispose of after that	etention Keep in-house for 3 years. time.
19. Name and Title of Preparer Jane	. C. Holschuh, Executi	ve Assistant	
20. Telephone Number 410-263-7961			21. Date 8/7/96

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Instructions - Prepare a separate form		CITY OF ANNAPOLIS Records Management Program		RECORDS INVENTORY		
for each new or revised record series.	Records Mana	gement Program	PAGE	1 OF	1	
1. Department Planning and Zoning	2. Division Administration		3. Unit			
DEFINITION - RECORD SERIES - A groudisposition purposes.	ip of related records no	rmally filed and used as	a unit for refere	nce as well as reter	ntion and	
4. Record Series Title Zoning Map Amendments	·		5. Earliest Ye 1970 to pre	ear/Latest Year sent		
of the series.	Contains original application, staff report, planning commission findings, final ordinance adopting City Council action on map					
7. Record Series Format(s)	8. Record Series Se	quence	9. Volume			
x Letter Size	Alphabetical  Numerical  xChronological		□ Microfil □ Comput	Num wer(s) m Reel(s) er Tape(s) Specify)	1	
	□ Geographical □ Other (Specify)	<del></del>	□ Microtil □ Comput	ccumulation  Num wer(s)less than ½ m Reel(s) er Tape(s) Specify)	2 drawer	
11. File is Used		12. File Becomes Ina	ctive After	· .		
□ Daily: □ Weekly x Mon	thly	3 □ N Number				
13. Current Location(s) (Bldg. Floor, Roc Gloucester Street, downstairs	om) 159 Duke of	14. Is Record Series Duplicated Elsewhere?  (If yes, specify office)  x No □ Yes				
15. Access Restrictions □ Yes x No (If yes, cite law(s) & regulations)		16. Audit Requirements x None □ State □ Federal □ Independent				
17. Is an index system used? (If yes explain briefly and describe any hardware/software.)  x Yes □ No Yes, we use a card file index which assigns a number comprised of year received, month received, and consecutive number assigned (96-9-491) ((same system for zoning text amendments))		18. Recommended R Dispose of after that		n-house for 3 yea	rs.	
19. Name and Title of Preparer Jane C.	19. Name and Title of Preparer Jane C. Holschuh, Executive Assistant					
20. Telephone Number 410-263-7961	·	21. Date 8/7/9	6			

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Instructions - Prepare a separate form	CITY OF ANNAPOLIS		RECORDS INVENTORY	
for each new or revised record series.	Records Mana	gement Program	PAGE1 OF1	
1. Department Planning and Zoning	2. Division Administration		3. Unit	
DEFINITION - RECORD SERIES - A groundisposition purposes.	up of related records no	ormally filed and used as	a unit for reference as well as retention and	
4. Record Series Title Major Subdivision Requests			5. Earliest Year/Latest Year 1970 to present	
Record Series Description (Briefly describe of the series. Contains original application, preliminary and Planning Commission				
7. Record Series Format(s)	8. Record Series Se	quence	9. Volume	
x Letter Size □ Micro Film x Legal Size □ Computer Tape □ Bound Book □ Floppy Disk □ Audio Tape □ Video Tape x Other (Specify) site plans	Alphabetical  Numerical  xChronological  Geographical		Number   Number	
	Other (Specify)		10. Annual Accumulation  Number  File Drawer(sess than 1/4 drawer  Microfilm Recl(s)  Computer Tape(s)  Other (Specify)	
11. File is Used		12. File Becomes Ina	ctive After	
□ Daily □ Weekly x Mon	thly	10 □ N Number	Ionth(s) x Year(s)	
13. Current Location(s) (Bldg. Floor, Roc Gloucester Street, downstairs	om) 159 Duke of	14. Is Record Series   (If yes, specify off x No □ Yes	Duplicated Elsewhere? ice)	
15. Access Restrictions □ Yes (If yes, cite law(s) & regulations)			16. Audit Requirements x None □ State □ Federal □ Independent	
17. Is an index system used? (If yes explain briefly and describe any hardware/software.)  x Yes □ No Yes, we use a card file index which assigns a number comprised of letter S (for subdivision), consecutive number, and year received (S-22-96).		<del>-</del>	etention Keep in-house for 10 years.	
19. Name and Title of Preparer Jane C	. Holschuh, Executive	Assistant		
20. Telephone Number 410-263-7961			21. Date 8/12/96	

Instructions - Prepare a separate form	CITY OF ANNAPOLIS Records Management Program		RECORDS INVENTORY	
for each new or revised record series.	Records Mana	gement Program	PAGE1 OF1	
1. Department Planning and Zoning	2. Division Administration		3. Unit	
DEFINITION - RECORD SERIES - A groundisposition purposes.	up of related records no	ermally filed and used a	s a unit for reference as well as retention and	
4. Record Series Title Board of Appeals Variances/Appeals	Cases		5. Earliest Year/Latest Year 1970 to present	
6. Record Series Description (Briefly describe of the series.  Contains original applications, staff report			d in the series. Include the purpose or function	
7. Record Series Format(s)	8. Record Series Se	quence	9. Volume	
x Letter Size	Alphabetical Numerical xChronological Geographical Other (Specify)		Number   S	
11. File is Used  Daily Weekly x Mon	thiv <sup>'</sup>	12. File Becomes In	active After  Month(s) x Year(s)	
Dany O Weekly X Mon	······	Number	A Teat(s)	
13. Current Location(s) (Bldg. Floor, Roc Gloucester Street, downstairs	om) 159 Duke of	14. Is Record Series Duplicated Elsewhere?  (If yes, specify office)  x No □ Yes		
15. Access Restrictions		16. Audit Requirements  x None □ State □ Federal □ Independent		
17. Is an index system used? (If yes explain briefly and describe any hardware/software.)  x Yes   No Yes, we use a card file index which assigns a number comprised of year received and consecutive number (96-521).			Retention Keep in-house for 10 years. ly opinion of Board with approved plan.	
19. Name and Title of Preparer Jane C	. Holschuh, Executive	Assistant		
20. Telephone Number 410-263-7961			21. Date 8/12/96	

Instructions - Prepare a separate form	CITY OF ANNAPOLIS Records Management Program		RECORDS INVENTORY	
for each new or revised record series.	Records Mana	gement Program	PAGE	1 OF1
1. Department Planning and Zoning	2. Division Administration		3. Unit	
DEFINITION - RECORD SERIES - A groudisposition purposes.	up of related records no	rmally filed and used as	a unit for refer	ence as well as retention and
4. Record Series Title Conditional Use Case Records	,	5. Earliest Y 1970 to pro	ear/Latest Year esent	
6. Record Series Description (Briefly describe of the series.  Contains original application and exhibits, contains original resolution of action (approved)	orrespondence, agency			
7. Record Series Format(s)	8. Record Series Se	quence	9. Volume	
x Letter Size	Alphabetical  Numerical  xChronological  Geographical		□ Microfi □ Compu	Number  awer(s) Im Reel(s) ter Tape(s) Specify)
	Other (Specify)	·	□ Microfi □ Compu	.ccumulation  Number awer(s)_1drawer per year Im Reel(s) ter Tape(s) Specify)
11. File is Used		12. File Becomes Inac		V ()
□ Daily □ Weekly x Mont	thly	Number □ M	Ionth(s)	x Year(s)
13. Current Location(s) (Bldg. Floor, Roo Gloucester Street, downstairs	om) 159 Duke of	14. Is Record Series I (If yes, specify off No x Yes, City		
15. Access Restrictions □ Yes x No (If yes, cite law(s) & regulations)		16. Audit Requirements  x None □ State □ Federal □ Independent		□ Independent
17. Is an index system used? (If yes explain briefly and describe any hardware/software.)  x Yes □ No Yes, we use a card file index which assigns a number comprised of letter C and year received, month received and consecutive number (C96-9-521).			etention Keep i	n-house for 10 years.
19. Name and Title of Preparer Jane C	. Holschuh, Executive	Assistant		
20. Telephone Number 410-263-7961	—		21. Date 8/12	/96 ·

Instructions - Prepare a separate form	CITY OF ANNAPOLIS Records Management Program		RECORDS INVENTORY
for each new or revised record series.	Records Mana	gement Program	PAGE1 OF1
1. Department Planning and Zoning	2. Division Administration		3. Unit
DEFINITION - RECORD SERIES - A groundisposition purposes.	up of related records no	rmally filed and used	d as a unit for reference as well as retention and
4. Record Series Title Site Design Review Records			5. Earliest Year/Latest Year 1987 to present
Record Series Description (Briefly describe     of the series.     Contains original application and submit			ound in the series. Include the purpose or function
7. Record Series Format(s)	8. Record Series Se	quence	9. Volume
x Letter Size	Alphabetical  Numerical  xChronological  Geographical  Other (Specify)		Number           □ File Drawer(s)
			10. Annual Accumulation  Number  File Drawer(s) less 1 per/year  Microfilm Reel(s)  Computer Tape(s)  Other (Specify)
11. File is Used		12. File Becomes	Inactive After
□ Daily □ Weekly x Mon	thly	Number	□ Month(s) x Year(s)
13. Current Location(s) (Bldg. Floor, Roc Gloucester Street, downstairs	om) 159 Duke of	14. Is Record Series Duplicated Elsewhere? (If yes, specify office) x No Yes	
15. Access Restrictions □ Yes x No (If yes, cite law(s) & regulations)		16. Audit Requirements  x None □ State □ Federal □ Independent	
17. Is an index system used? (If yes explain briefly and describe any hardware/software.)  x Yes   No Yes, we use a card file index which assigns a number comprised of letter SDP and year received, month received and consecutive number (SDP 96-9-32).			d Retention Keep in-house for 10 years. ntly landscape agreement and approved
19. Name and Title of Preparer Jane C	. Holschuh, Executive	Assistant	**************************************
20. Telephone Number 410-263-7961			21. Date 8/12/96
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Instructions - Prepare a separate form	CITY OF ANNAPOLIS Records Management Program		RECORDS INVENTORY		
for each new or revised record series.	Records Mana	gement Program	PAGE1OF1		
1. Department	2. Division		3. Unit		
Planning and Zoning	Historic Preserva	ation			
DEFINITION - RECORD SERIES - A groudisposition purposes.	up of related records no	ormally filed and used as	a unit for reference as well as retention and		
4. Record Series Title  HDC Minutes/Legal Ads/Agendas			5. Earliest Year/Latest Year1986to1995		
6. Record Series Description (Briefly describe of the series.	the types of informatio	n/documents/forms found	l in the series. Include the purpose or function		
Minutes of the Historic District Comm meetings.	ission's regular and a	dministrative meeting	s; legal ads and/or agendas for respective		
7. Record Series Format(s)	8. Record Series Se	quence	9. Volume		
X Letter Size	□ Alphabetical □ Numerical  X Chronological □ Geographical □ Other (Specify)		Number  □ File Drawer(s) □ Microfilm Reel(s) □ Computer Tape(s) X Other (Specify) 1 bookcase shelf  10. Annual Accumulation  □ File Drawer(s) □ Microfilm Reel(s) □ Computer Tape(s) X Other (Specify) 1 notebook /yr		
11. File is Used		12. File Becomes Ina	& 1 file/yr		
□ Daily □ Weekly X Monthly	:		Month(s) X Year(s)		
13. Current Location(s) (Bldg. Floor, Roo 159 Duke of Gloucester Street (1st floo		14. Is Record Series Duplicated Elsewhere? (If yes, specify office) X No □ Yes			
15. Access Restrictions □ Yes (If yes, cite law(s) & regulations)	X No	16. Audit Requirements  X None □ State □ Federal □ Independent			
17. Is an index system used? (If yes explain briefly and describe any hardware/software.)  ☐ Yes X No		18. Recommended Retention  Archive Permanently			
19. Name and Title of Preparer Jean Pekofsky, Historic Preservation Assistant					
20. Telephone Number 410-263-7941	·		21. Date 9/4/96		

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<u>Instructions</u> - Prepare a separate form for each new or revised record series.	CITY OF ANNAPOLIS  Records Management Program		RECORDS INVENTORY		
for each new or revised record series.	Records Walla	gement Frogram	PAGE1 OF1		
1. Department	2. Division		3. Unit		
Planning and Zoning	Historic Preservation				
DEFINITION - RECORD SERIES - A groudisposition purposes.	up of related records no	ormally filed and used	as a unit for reference as well as retention and		
4. Record Series Title			5. Earliest Year/Latest Year 1989 to 1994		
HDC Property Files					
<ol><li>Record Series Description (Briefly describe of the series.</li></ol>	the types of information	on/documents/forms fou	nd in the series. Include the purpose or function		
Applications for alterations or new con Approval; correspondence regarding viol		site plans, constructi	on documents, photographs; Certificates of		
Approval, correspondence regarding viol			•		
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7. Record Series Format(s)	8. Record Series Se	quence	9. Volume		
X Letter Size	X Alphabetical		<u>Number</u>		
X Legal Size □ Computer Tape □ Bound Book □ Floppy Disk	X Numerical		□ File Drawer(s)4		
□ Audio Tape  □ Video Tape			□ Microfilm Reel(s)		
□ Other (Specify) Blueprints/site plans	□ Chronological		□ Computer Tape(s) □ Other (Specify)		
	□ Geographical				
	□ Other (Specify)		10. Annual Accumulation		
		<del></del>	Number		
			□ File Drawer(s) 1		
	·		☐ Microfilm Reel(s)		
			□ Other (Specify)		
11. File is Used		12. File Becomes I	nactive After		
X Daily □ Weekly □ Mon	thly	3 Number	Month(s) X Year(s)		
13. Current Location(s) (Bldg. Floor, Room) 159 Duke of Gloucester Street (1st floor)		14. Is Record Series Duplicated Elsewhere?  (If yes, specify office)  X No □ Yes			
15. Access Restrictions □ Yes X No (If yes, cite law(s) & regulations)		16. Audit Requirements			
( ) (-) (-)		X None □ State □ Federal □ Independent			
17. Is an index system used? (If yes explain briefly and describe any hardware/software.)  X Yes □ No		18. Recommended Retention  Archive Permanently			
Applications are logged on the compute	r using Paradox .	<u> </u>			
19. Name and Title of Preparer Jean Pe	kofsky, Historic Pres	ervation Assistant			
20. Telephone Number 410-263-7941	·		21. Date 9/4/96		
H:\WPDATA\HDC\INV2.		/			

<u>Instructions</u> - Prepare a separate form	CITY OF ANNAPOLIS		RECORDS INVENTORY	
for each new or revised record series.	Records Man	agement Program	PAGE1 OF1	
1. Department Planning and Zoning	2. Division Administration		3. Unit	
DEFINITION - RECORD SERIES - A gro disposition purposes.	up of related records r	normally filed and used a	s a unit for reference as well as retention and	
4. Record Series Title Annexation Petitions			5. Earliest Year/Latest Year 1970 to present	
of the series.  Contains original petition for annexation	ı, analysis of extensio	on of services, correspon	d in the series. Include the purpose or function ndence, staff report, planning commission on findings on zoning, City Council action.	
7. Record Series Format(s)	8. Record Series S	equence	9. Volume	
x Letter Size	Alphabetical Numerical xChronological Geographical Other (Specify	·	Number   2	
11. File is Used  □ Daily □ Weekly x Monthly		12. File Becomes Inactive After  10		
13. Current Location(s) (Bldg. Floor, Room) 159 Duke of Gloucester Street, downstairs		14. Is Record Series Duplicated Elsewhere?  (If yes, specify office)  No x Yes, City Clerk's Office.		
15. Access Restrictions □ Yes x No (If yes, cite law(s) & regulations)		16. Audit Requirements  x None □ State □ Federal □ Independent		
17. Is an index system used? (If yes explain briefly and describe any hardware/software.)  Yes x No		18. Recommended Retention Keep in-house for 10 years. Archive for 20 years; destroy after 20 years.		
19. Name and Title of Preparer Jane C	. Holschuh, Executiv	'e Assistant		
20. Telephone Number 410-263-7961			21. Date 8/12/96	
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Name of Record	Description of Record	Retention/Disposal	Inventory
Street Address Files	Contains correspondence, use permits, building permits, minor subdivision approvals, and other documents on all street addresses filed alphabetically.	Retain in-house. Staff to clean out old use permits, building permits, etc. These are daily, working files. Do not archive.	Legal File Drawers: 22
Zoning Text Amendments	Contains ordinance, staff reports, planning commission findings, and final adopted ordinance of Code changes to zoning section of City Code.	Keep in-house for 3 years. Dispose of after completing detailed index of what text amendment was for, if it was adopted and date.	Legal File Drawers: 5
Zoning Map Amendments	Contains original application, staff report, planning commission findings, final ordinance adopting City Council action on map amendment.	Keep in-house for 3 years. Dispose of after completing of detailed index of map amendment and action taken.	Legal File Drawers:
Major Subdivision Requests	Contains original application, preliminary plat, staff report, planning commission findings, final plat approved by City Council and Planning Commission.	Keep in-house 10 years; Dispose	Legal File drawers: 3
Board of Appeals Variances/Appeals Cases	Contains original applications, staff reports, site plans, Board of Appeals opinions on case.	Keep in-house 10 years; Archive permanently opinion of Board with approved plan.	Legal File drawers: 5

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Conditional Use Case Records	Contains original application and exhibits, correspondence, agency review comments, staff report, planning commission findings, City Council resolution of action.	Keep in-house 10 years; Archive permanently resolution with plan.	Legal File Drawers: 21
Site Design Review Records	Contains original application and submittal attachments, site plan, correspondence, approved set of signed plans.	Keep in-house 10 years; Archive landscape agreement and approved plan; Retain permanently.	Legal File Drawers: 3
Annexation Petitions	Contains original petition for annexation, analysis of extension of services, correspondence, staff report, planning commission findings, City Council action, staff report on zoning land annexed, planning commission findings on zoning, City Council action.	Keep in-house 10 years; Archive for 20 years; Destroy after 20 years	Legal File Drawers: 2
Minutes/Agendas of Planning Commission and Board of Appeals	Contains minutes of meetings of Planning Commission and Board of Appeals.	Keep in-house 10 years; Archive permanently.	Legal File Drawers: 2